PIMMS User Manual

The Management System for
Property Investor Associations'

NZPIF.ORG.NZ

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Introduction and Overview of PIMMS

PIMMS is essential for your Association to speed up access to membership benefits such as Website access, BaycorpAdvantage membership, discounts etc. PIMMS streamlines the administration of memberships and may reduce duplication of effort.

We recommend that you continue using whatever system you are currently using until you are satisfied that PIMMS provides all the membership management functions you require and is accurate in maintaining your membership records.

PIMMS has many useful applications, however if it does not perform any task you would like it to, then let us know and we will try to incorporate them into the system.

Here are some of the key functions that PIMMS performs.

Membership Management
PIMMS allows you to accurately manage your existing, new and renewing members.
PIMMS can also be used for printing labels and notifying members that their membership year is nearly completed and time for them to renew their membership.
PIMMS allows the NZPIF Office to immediately know of your Associations new and renewing members so they can immediately start receiving some of the benefits from belonging to your Association. This also saves your membership manager from separately having to list all new and renewing members, organise a cheque for affiliation fees and send these items to the office for them to process.
PIMMS allows the office to send your Association a monthly account of accreditation fees along with a list of your new and renewing members so you have a printed record to check against.
The streamlined system that PIMMS offers should help your membership administrator to save time and effort in keeping track of membership activities.

Promoting your Association
The NZPIF website has been designed to attract as many people searching for property investment information as possible.
Searchers can click onto their local PIA section of the website and find out about your Association.
You control what they see. You can use the front page to promote your association and can also include local news of interest and events that you are putting on, such as your regular meetings, social events or seminars
There is an information form for searchers to complete and send to you, and they can request you to contact them.
PIMMS provides a method of keeping track of enquiries from non-member investors and provides further opportunities to promote your association to them, helping to increase your membership.

Getting Started

It is probably a good idea to allocate administration of your Association's section of PIMMS to one person, probably the person already in charge of maintaining the Associations Membership List. We refer to this person as the Membership Manager.

To use PIMMS, go to the NZPIF Website Home page (www.NZPIF.org.nz) and click on "Local Associations" from the top tool bar, then select your Association from the list.

At the bottom of the screen there is a toolbar with "association login" on the right hand side. Click on this to log into the system.

A faster alternative method is to enter http://www.nzpif.org.nz/afa.asp?idWebPage=11564 or even better, create a shortcut to this within your browser.

To protect the information displayed on your Associations section of the Website, you have to enter a username and code. Enter this and click the login button.

If you lose your password there is an option to have it sent to you. If you have any problems contact the Webmaster, Sarah King, on Webmaster@NZPIF.org.nz or 09-815 8642.

If you need help at any stage you can click onto the "Help" section from the Admin Panel, contact the Webmaster or contact the NZPIF Office.

Purpose of using PIMMS

- Provides members with website access
- Members will get their discount cards faster
- Associations will have membership numbers quickly for members in a hurry to immediately sign-up to Baycorp or Caltex
- Members can update their own records when contact details change
- Provides a system for Associations to manage their membership
- Reduces potential for errors between Associations and NZPIF records
- Associations don't have to manually send membership changes to the NZPIF office
- NZPIF can send accounts to Associations monthly and in arrears, saving Associations having to pay affiliation fees before their members can get NZPIF Membership Cards

Requirements

Your Membership Manager will need the following to incorporate PIMMS into your current management system:

- A computer with internet access (dial-up OK)
- Excel, Works or some form of spreadsheet

Fitting PIMMS into your current membership system

Different Associations manage their membership in different ways. This could be paper based or in a computer using a spreadsheet or database system.

PIMMS is flexible and may be able to fit in with your current system, however some changes to your system may need to be made. Over time and in consultation with Associations, changes will be made to PIMMS to make it the best system for Associations to manage their membership.

As with any new system, implementing PIMMS will require some initial effort from Associations, however the benefits that PIMMS can bring Associations should warrant this initial effort.

If you currently use a paper or spreadsheet based system, information can be exported from PIMMS into a spreadsheet, such as Excel, which can then be organised to match you requirements.

After using the trial version of PIMMS, there may be some essential changes you require to PIMMS for it to work. Please notify us of these as soon as possible so they can be accounted for.

If you are using a database system, you may have some features that are not available in PIMS. Please let us know what these features are so we can attempt to include them in PIMMS, for other Associations to potentially benefit from.

If you are having difficulty seeing how PIMMS can fit into your existing membership Management system, please contact NZPIF Vice President, Andrew King, on 09-815 8642 or email Andrew@propertyInvestor.info

Important information

Members versus Memberships

A **Membership** is one entity within an Association that may be an individual, couple or business/corporate membership. A **Member** is a person who has joined the Association under a membership category. So you can have John Smith as a member under the John Smith Membership, or John and Jane Smith as members under a couple membership, or John Smith, Jane Jones and Stephen Tindall under a corporate membership. All members need to be linked to a **Membership**.

Membership dates

Associations can select either a Monthly Rollout or Calendar based system, depending on their current system.
Monthly Rollout allows memberships to start on any month and go for one year. As an example, a member joining in July will be a member until the following June, at which time they will be invited to renew their membership.
The Calendar option is for Associations who have a standard end date for all members. Associations can enter into PIMMS which month all memberships end. As an example, an Associations policy may be for all

memberships to finish in March and renew in April. A member joining in July will be a member until the following March, at which time they will be invited to renew their membership along with all other members.

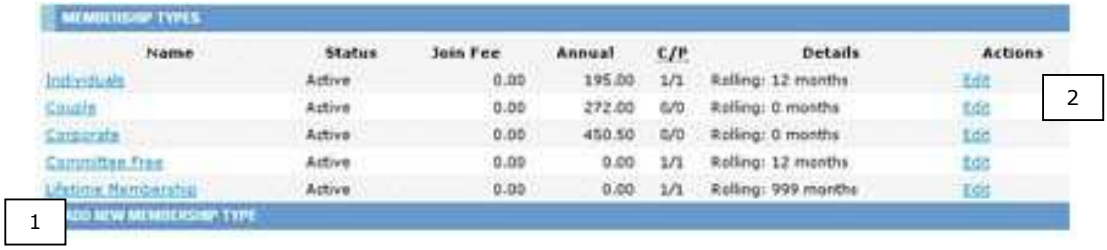
Downloads
When you download information from PIMMS, it is saved in a CSV file (Comma Separated Values).

A CSV file can be opened by most spreadsheets, including the most common spreadsheet, Excel.

The person handling your Memberships should have a spreadsheet and knowledge of how to use a spreadsheet so they can produce standard forms or letters (in Word for instance) and merge the information with the spreadsheet to produce letters to members, address labels, meeting labels, reminder notices etc.

Setting up your Associations Preferences

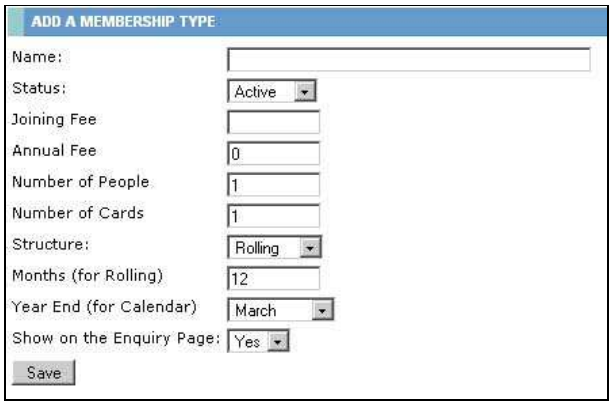
From under Admin in the main Menu, select "Membership Types"



From the Membership Type screen, you can add new membership types your Association has and edit your Associations Membership Types.

Add New Membership Type

Click on "Add New Membership Type" (1)



From this screen you enter the following:

1. Name of the new membership type
2. Select active if you are implementing it straight away.
3. Any joining fee you may have or leave this field blank
4. The annual fee
5. The maximum number of people/members that the membership may contain (i.e. couples 2, Corporate 3)
6. The number of NZPIF cards issued under the membership. (Note that the NZPIF capitation fee applies for each card issued by the NZPIF Office)
7. Structure: This may either be Rolling or Calendar. Rolling means they start in one month and end (usually) a year later. I.e. they start in August and end in July the following year, assuming the months' option (next field) is set to 12.
   The Calendar option is for Associations that have a set year end for all memberships.
8. (For rolling only) Number of months that the membership lasts.
9. (For Calendar only) Month that your Associations memberships end.

10. Select "Yes" if you want this membership type to appear on your Associations section of the NZPIF website. For instance you may not want to show a Life Membership option to the public.

Edit a membership type

This is when you make changes to your membership types, such as changing your membership fee.

Click on the "Edit" (2) option of the membership type you wish to change.

This opens the following screen

You can then make any changes required and click "save" when completed.

Entering your committee details

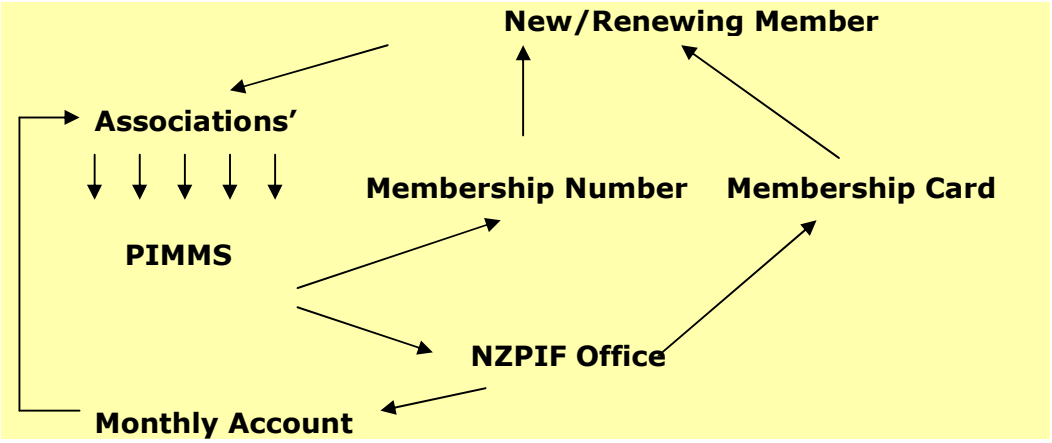
Membership System

The members' section is where the Associations membership will be maintained. The amount of information that is stored is determined by each Association.

This document aims to explain how the Members' section *may* be used, not how it *must* be used. Different Associations may use the membership system differently. Associations may also have suggestions or requirements for how the system can be improved. The NZPIF will collate these requirements and suggestions and use them to continually improve PIMMS.

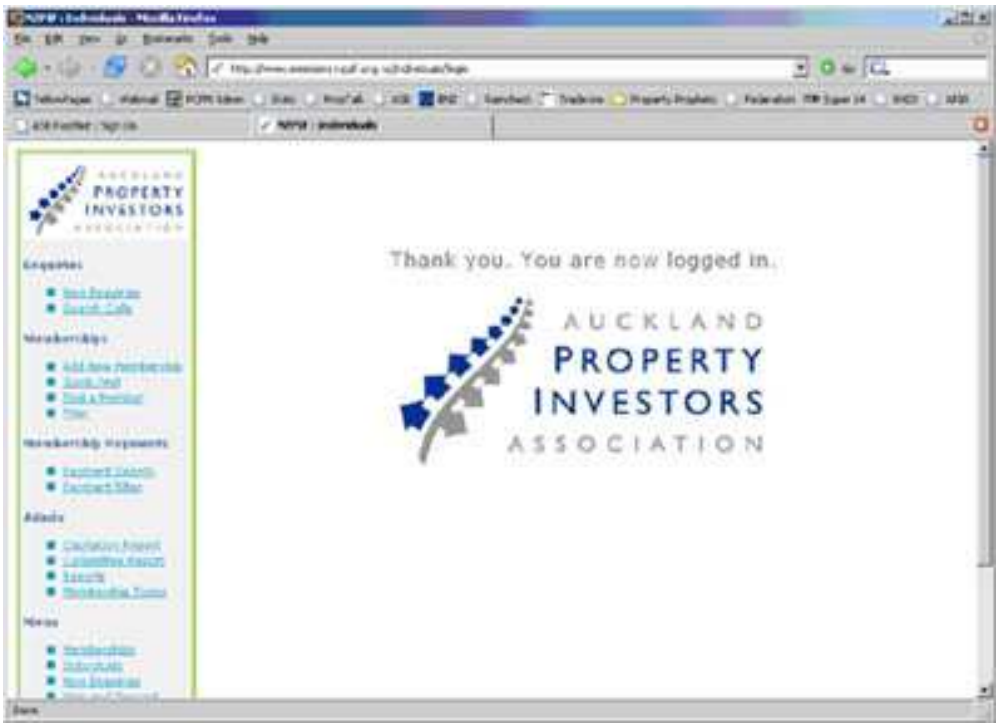
Operational overview

- Investors apply for membership of their local association or an existing member renews
- The local Association membership Manager enters the new or renewing member into PIMMS and selects the start month
- The new membership details are immediately available to the NZPIF Office
- The NZPIF Office processes the Membership so that the Membership number is available for the Association and the member to view and the Membership card is sent to the Association or directly to the member, depending on Association policy.
- Each calendar month, the NZPIF Office produces a report showing each association's new and renewing members for that month, plus the total number for the month. (If a member is entered in May but their membership starts in June, this member will not appear in the May report.)
- An invoice for each Associations Affiliation Fees is produced and the above report is attached.



The PIMMS Membership Screen

See "Getting Started" on page 3 for login details. To enter the Membership System, click on "PIMMS" from the Admin panel.



From this screen, you can enter new members, renew existing members, search the membership database and export information from the system. You can also manage enquiries from the public regarding joining your association.

Adding New Members

NB: Don't use the forward and backward arrows of your web browser when using the "Add a new member" screens.

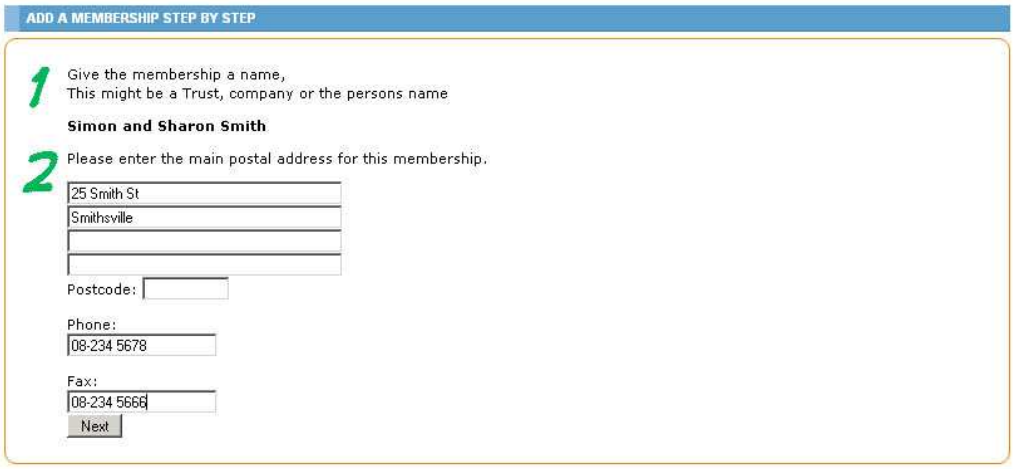
Under Memberships in the Main Menu, click on "Add a new Membership"

Step 1.
Give the membership a name (This could be ABC Ltd, Simon Smith, Simon and Sharon Smith etc) then click next.

NB: This field is used for generating the name on NZPIF cards and is likely to be used for address labels or addresses on standard letters you may

wish to use. It is best to put first names first then surnames for individuals couples.

Step 2.
Enter the main postal address, phone and fax numbers for the membership. (If the Association does not want membership addresses to be seen by the NZPIF Office then the Associations postal address will be automatically selected if this option is chosen in Preferences. Otherwise these fields can be left blank. NB: If Associations do not want the NZPIF Office to see members Addresses, then cards will have to be sent to the Association rather than the member, adding to administration effort and slowing when the member receives their card.)

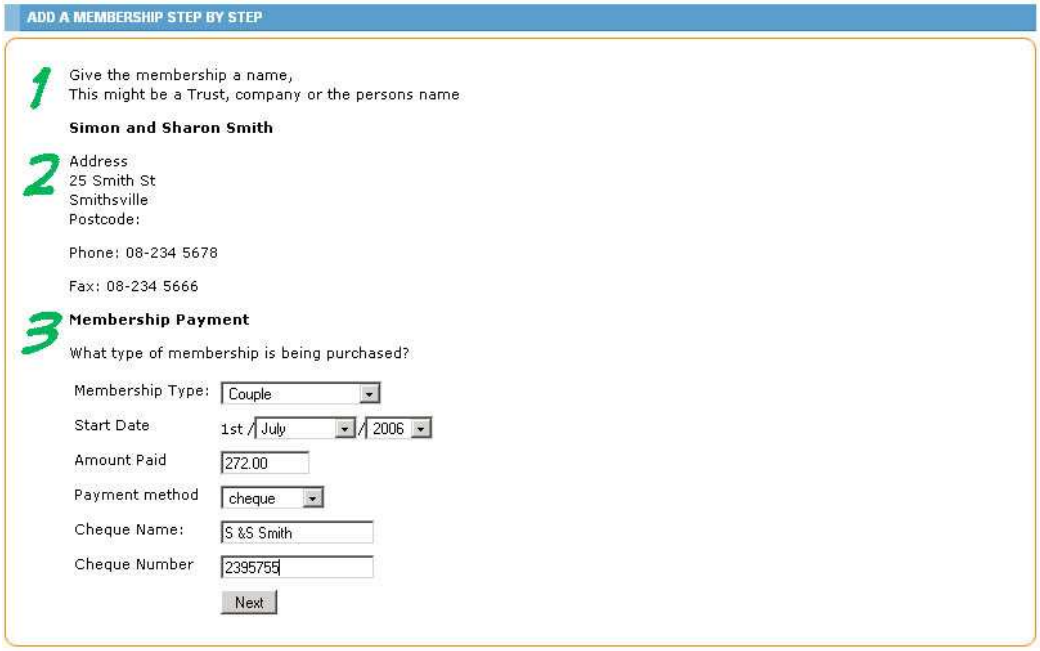


Click "Next" when completed.

Step 3.
Enter payment details and membership start date

Select Membership type (This is set through Preferences)

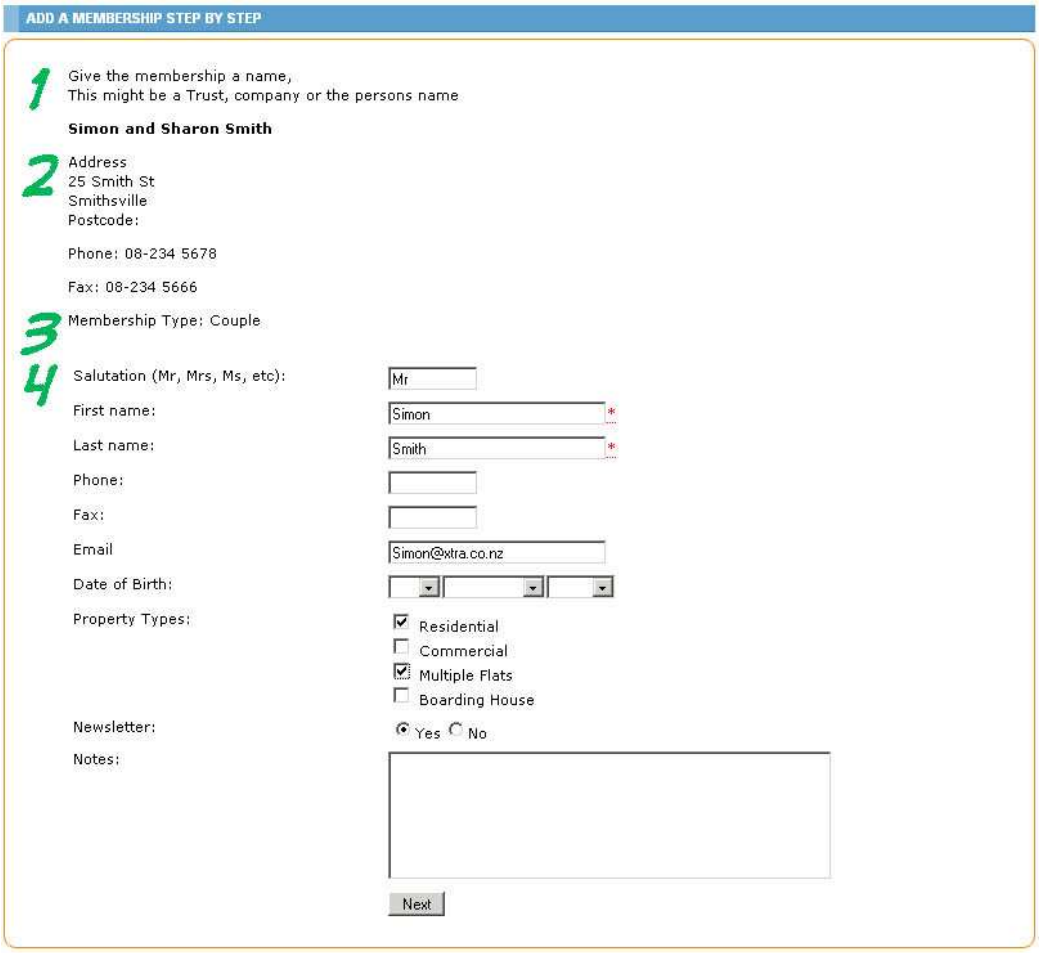
Enter the month that the membership will start. This could be the current month or it could be the following month. Associations may decide that after a monthly meeting, memberships will start on the following month. This will all set the NZPIF membership date.



The amount paid will automatically be entered based on your settings in preferences (See Setting up your Associations Preferences on page 16).

You can choose to enter the payment method and details then click Next.

Step 4.
Enter the members of the membership. This could be an individual, a couple or members of a corporate membership.



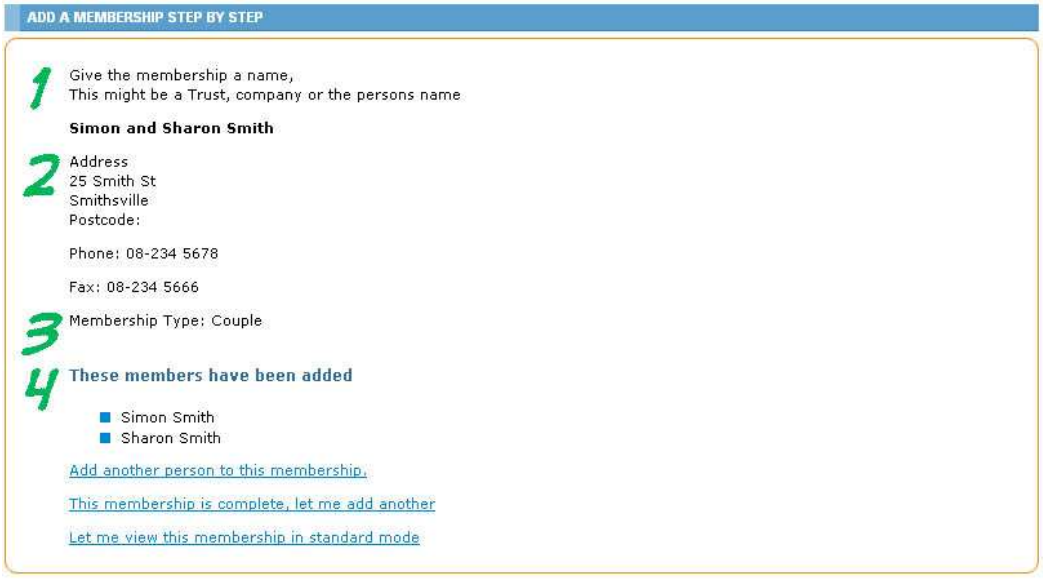
The only fields that must be completed (red asterix) are the members first and last name. All other fields may or may not be used.

Date of Birth and Property Types are for research purposes and to alert specific members of factors that may affect them, such as changes to the RTA regarding Boarding Houses.

The Date of Birth can be left blank if not known. You can leave have the year entered but not the day or month.

If you don't know if the member wants a newsletter or not, leave as "Yes".

When complete, click Next. The new screen shows the members that have been added and allows you to add more members to the membership.



When all members have been added to the membership, you can choose to add another membership or view the membership.

If you leave the screen before entering all members, click on "Find a Membership" from the main menu and locate the membership, then select "add an individual" to add the missed member.

Find a Membership

When a member renews their membership, search for the membership through "Find a membership" in the menu. On the top menu bar of this screen, you can also search for individual members.

This option displays all records when first selected. These results can be downloaded to a spreadsheet by clicking on Download.

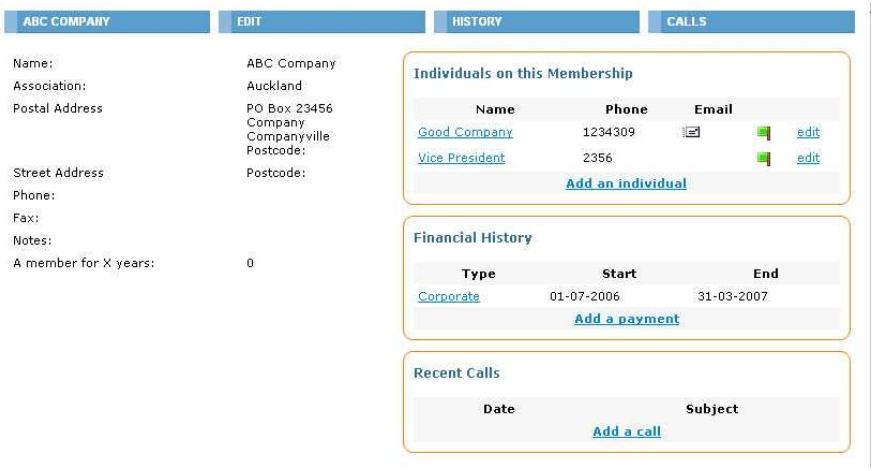
To Find a specific membership, enter either the Membership name, address, phone or fax number and click on Search. You can then click onto the located membership to bring up their records.

Editing Memberships

To edit a membership, first you find the membership by clicking on the Find a membership option on the main Menu. Finding and Editing Members is similar, except you choose Find a Member from the Menu Bar at the top of the screen.

You can search by Name, Address, Phone or Fax number. Enter one or more details and click on Search

Click on the name of the Membership you want to edit to bring up their details.



Click "Edit" at the top menu to edit the membership details. Click on the individual members if you want to edit their details.

Searching and downloading Membership information

Depending on what information you want to download, there are four options on the Main Menu for searching and downloading Membership Information. These are:

1. Find a Membership
2. Find a Member
3. Payment Search
4. Payment Filter

1. Find a Membership

This option allows you to search for a membership, either by the membership name, address, phone or fax number. It is primarily to find memberships within PIMMS so their membership can be renewed or their details can be edited.

You can also download full information from within PIMMS to a format that can be opened in a spreadsheet.

2. Find a Member

Similar to the Find a Membership option, Find a member allows you to search for an individual member, either by the Membership Details or the Members name, address, phone, fax or email.

It is primarily to find members within PIMMS so their details can be edited. It can also be used to quickly identify all those who are to receive your Associations Newsletter and download this information to a spreadsheet.

3. Payment Search

Payment Search is for finding details based on payment information you have, such as a cheque number, cheque name or when their membership started or finished.

4. Payment Filter

This option is good for producing membership address labels and name labels for meetings. Click on the Payment Filter option, under "Payments" in the Main Menu.

There is a "list by" option which allows you to sort the membership information by either Membership order or Member order.

The "Filter By" option lets you select from eight different options. Select the appropriate option and click search to generate a list on screen. If correct, click on "Download" to download to a spreadsheet.

The correct option will depend on your Associations system and possibly linking in with Magazine postings.

Filter options:

Renewals Next Month	Selects members who are in their final month of membership. E.g. if run on April 25 will select members who membership ends at the end of April.
Renewal in two Months	Selects members whose final month of membership is the following month. E.g. if run on April 25 will select members who membership ends at the end of May.
Renewal in three Months	Similar to above. Can be used as the first advise to members, giving them plenty of opportunity to renew their membership early. Could link in with an early payment discount to encourage them.
Lapsed this month.	Selects the memberships that have lapsed in the month the option is run. I.e. if run on April 25th, will select the members whose membership expired at the end of March.
Lapsed last month	Selects the memberships that have lapsed in the month prior. I.e. if run on April 5th, will select the members whose membership expired at the end of February.
Financial Members	Allows you to search for all members who are currently financial.
Financial Members	Allows you to search for all members who are currently financial from the following

	month. This could be used for producing address labels at an early stage, such as for distributing the magazine.
Lapsed members and Guests	This allows you to select all previous members and guests of the Association. This could be used for a membership drive, advising them of a special meeting they may be interested in or alerting them to industry information they should be aware of.
All	This allows you to download all members, past and present, plus guests, that are held in PIMMS. This could be used to advise them of some industry information.

Identifying members when it is time to renew

Use the "Payment Filter" option under "Payments" in the Main Menu to identify renewing members. (See 4. Payment Filter on page 16 for more information)

Ensure you list your search by Memberships (1).

At "Filter By" (2) you may choose to select Renewals next month, Renewals in two months or three months to download just those members who are due to renew. This option may suit if you are just sending a notice to these members advising them that they need to renew their membership.

If you are sending members renewal notices with an Association newsletter or magazine, you may choose to select all financial members or all financial members next month. This will download all members who are due to receive the newsletter or magazine and you can then search the spreadsheet to identify those that are due to renew so they can have a renewal notice included as well.

Once you have downloaded the members to a spreadsheet (3), you can merge the spreadsheet with a standard letter that advises members to renew their membership. This standard letter could include a reminder of

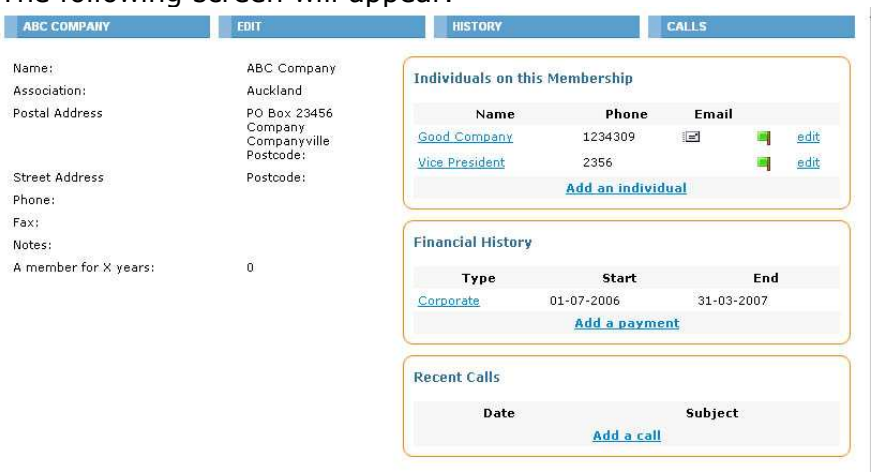
the benefits of being a member and an invoice that they can retain for their tax records.

When a Member Renews

When a member renews their membership, search for the membership through "Find a Membership" in the menu. (See Find a Membership on page 14)

Click on the membership to bring up their records.

The following screen will appear.



Check if any of the membership details have changed and update the records. To renew the membership, click on "Add a payment" from the Financial History section of the screen.

Select the membership type and start month of the renewing membership. The amount paid will automatically be entered.

Enter the payment method, which can either be cheque, visa, mastercrd, cash or other. The appropriate fields for the various payment options will appear when the payment method has been selected.

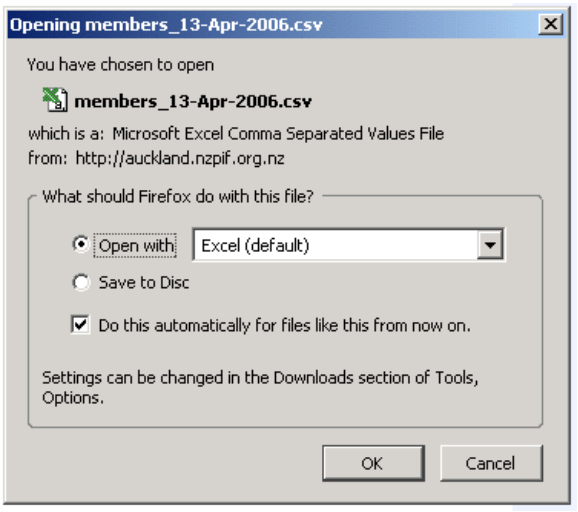
When entered, click save.

Printing labels

To keep the system flexible, labels are not generated directly from the database.

Select the data you want and export the data to a CSV file.

A CSV file is a special type of text file that can be read with a text editor or more commonly with Microsoft Excel or some other spreadsheet. The following screen will appear.


Opening members_13-Apr-2006.csv
You have chosen to open
members_13-Apr-2006.csv
which is a: Microsoft Excel Comma Separated Values File
from: http://auckland.nzpif.org.nz
What should Firefox do with this file?
Open with
Excel (default)
Save to Disc
Do this automatically for files like this from now on.
Settings can be changed in the Downloads section of Tools, Options.
OK
Cancel

You can either choose to open the report directly or save it to a disc (which can also save directly to your hard drive). If you want to always show your report like this, then select "Do this automatically for files like this from now on". Click OK when ready.

By creating Excel Spreadsheet lists you have the ability to then send mail merged letters or formatted emails to members.

Mail Merging using Microsoft Excel and Word is relatively easy. It is likely that the person handling your Associations membership will be able to create mail merges. If not, you will need to find a committee member or someone familiar with Excel and Word who can teach them.

Website enquiries from Property Investors

Property Investors who come to the NZPIF Website may want more information about your local association. They do this by making an enquiry, which appears in the Membership Enquiries section of the Admin Panel.

View New Enquiries

This shows a list of new enquiries from property investors viewing the website and wanting information on your Association.

The number of new enquiries is shown on the right hand side of the heading. The list can be viewed by clicking on "View New Enquiries" and then each enquiry selected by clicking on "View" next to the enquirers name.

Hint: A quick way to answer enquiries is to use the signature option in Microsoft Outlook. This allows you to store and retrieve a standard reply to people making an enquiry, without having to rewrite the reply. You can edit your message once it is in an email.

(The following instructions may differ depending on your Operating System)

To set up a signature for replies, select Tools/Options to bring up a screen. Select the Mail format tab and click on Signature Picker at the bottom of the screen. Click on "New" from the screen that appears. Enter a name for your signature, such as Enquiries email reply or whatever you prefer. Choose options on how to create your signature and click Next.

Enter the standard reply you would like to send. Experiment with the various options available. When you are happy with your reply, click Finish. Click OK in the next screen. Click OK again in the next screen.

This has set up your standard reply signature. To use this signature, click onto the enquirers email address from within the NZPIF database and an addressed email will automatically open. Select from Outlooks tool bar Insert/Signature and select your standard reply. This will place it into the body of your email.

If required you can edit the standard reply by adding the enquirers name and answering specific questions they may have left in their enquiry, plus letting them know current information such as details of your next meeting.

Once an enquiry has been opened and the person has been contacted, the enquiry should be archived. This moves the enquiry to the Old Enquiries section and makes it easy for you to keep track of which enquiries have been answered.

View Old Enquiries

Old Enquiries are stored in a separate list, but are saved in case they are needed in the future. This could be for promotional events.

Back up

If you have any problems using PIMMS, go first to your manual or online Help.

If you need to speak with someone about an operational or system matter, contact the NZPIF Office in the first instance.

NZPIF Office
Susan Rees
Phone: 03- 357 9243 Fax: 03-358 3914
Email: Admin@NZPIF.org.nz

If the NZPIF Office cannot assist you or you have a technical enquiry, contact the Webmaster, Sarah King.

Webmaster
Sarah King
Phone: 09-815 8642 Fax: 09-815 8648
webmaster@NZPIF.org.nz

lose your password there is an option to have it sent to you. If you have any problems contact the Webmaster, Sarah King, on Webmaster@NZPIF.org.nz or 09-815 8642.

If you need help at any stage you can click onto the "Help" section from the Admin Panel, contact the Webmaster or contact the NZPIF Office.